



2018 FPAGA Regional Symposium

ELEVATE

Practice . Ownership . Ethics . Technology.

7:00	8:00	Registration and Breakfast		
8:00	8:15	Welcome and Announcements – Salon "F"		
8:15-9:15		General Session – Salon "F" Bill Winterberg: FP Pad Using Technology to Enhance the Advice You Provide Your Clients		
9:15	9:30	Break to Visit with Partners		
9:30	10:30	Concurrent Break Out Session #1		
		Salon "C"	Salon "D"	Salon "F"
		Legacy Card Christy Eckoff (1 CFP CE, 1 GA Ins.)	Reverse Mortgages: The Cinderella of Retirement Planning Harlan Accola (1 CFP CE, 1 GA Ins.)	Restrictive Covenants & The Broker Protocol Tom Potter Chip Collins
10:30	10:45	Break to Visit with Partners		
10:45	11:45	Concurrent Break Out Session #2		
		Salon "C"	Salon "D"	Salon "F"
		Propel Your Business By Optimizing & Owning Your Tech Decisions Stephanie Macon	Being Broke Ain't Sexy! Eric Smith (1 CFP CE, 1 GA Ins.)	Economic Update Atlanta Federal Reserve (1 CFP CE)
11:45	12:15	Lunch ~ Partners Welcome / HONORS Ceremony - Salon "F"		
12:15 – 2:15 pm		Keynote – Salon "F" Bonnie Kitchner, Sea Change: CFP Board Ethics 2018: enhancing your ethical intelligence (2 hours CFP CE, 2 GA Ins.)		
2:15	2:30	Break to Visit with Partners		
2:30	3:30	Concurrent Break Out Session #3		
		Salon "C"	Salon "D"	Salon "F"
		What a Financial Planner Must Know About Estate Disputes Eric Broel (1 CFP CE)	Business Tax Credits Betsi Barrett (1 CFP CE)	Betterment Garrett Oakley
3:30	3:40	Break to Visit with Partners		
3:45-4:55		Keynote – Salon "F" Bob Veres (1.5 CFP CE, 2 GA Ins.)		
4:55	5:00	Closing Remarks & Conference Adjourned		
5:00	6:30	Reception		

*Speakers and times subject to change

**Presentations with approved CE are marked